User Manual

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Customer Helpdesk

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1 Information on the Document

1.1 Project Survey

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1.2 Version Management

Version	Author, Date	Chapter	Description
1.0	M.Veit; 14.11.2007	All	Creation of document
1.1	MiFr; 07.03.2008	3.2; 3.3	
1.2	MiFr; 30.04.2009	3.3	

2 Introduction

Welcome to the User Manual of the customer helpdesk by TechniData. The helpdesk system is based on the program JIRA of the company Atlassian. This document will help you become familiar with the usage of the program and provides detailed information about the functionality you need to:

- create issues
- send issues to TechniData
- answer queries
- read provided answers.

The helpdesk should simplify and improve the communication between you and TechniData. According to the contracts closed between you and TechniData you may create issues containing:

- errors
- general requests
- change requests
- iImprovement suggestions.

TechniData will provide an answer or a solution for your issue via the Helpdesk system.

3 Handling of the Program

This chapter describes the general handling of the program.

3.1 Preface

In this subchapter you will find general information on how to use the program. Our helpdesk is a so-called web application. This means that it is not necessary to install it on your local computer; you can just run it by using your web browser (Microsoft Internet Explorer, Firefox, Opera etc.).

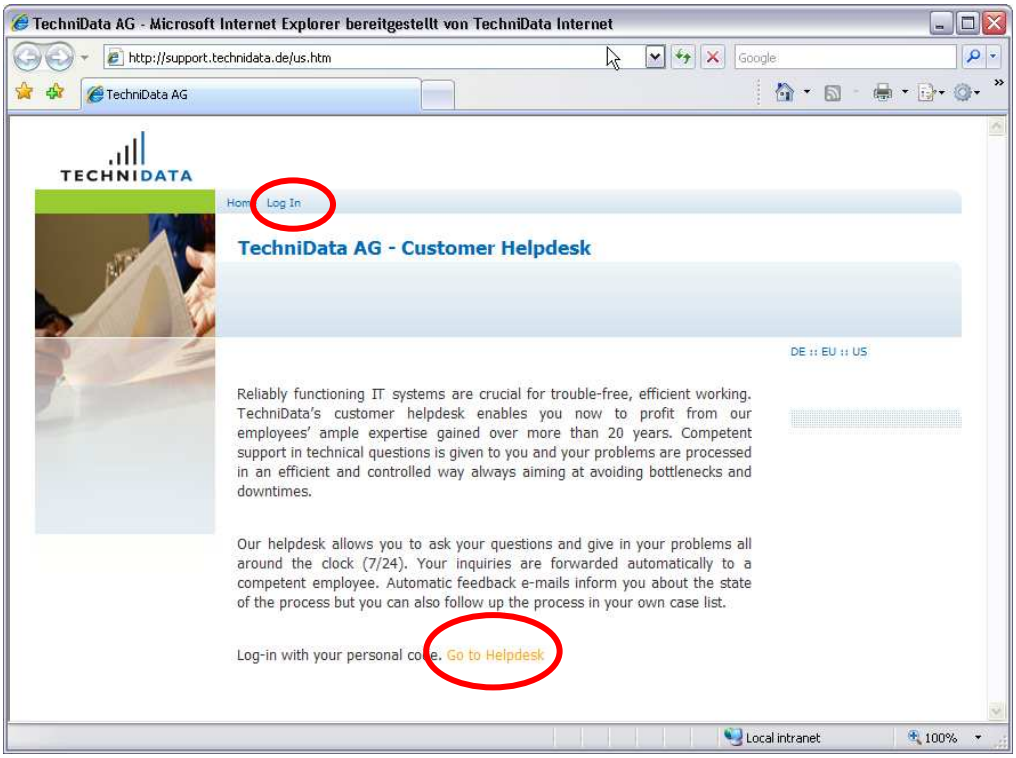
For entering the helpdesk use the web address **http://support.technidata.de/us.htm**

Please keep in mind the following points:

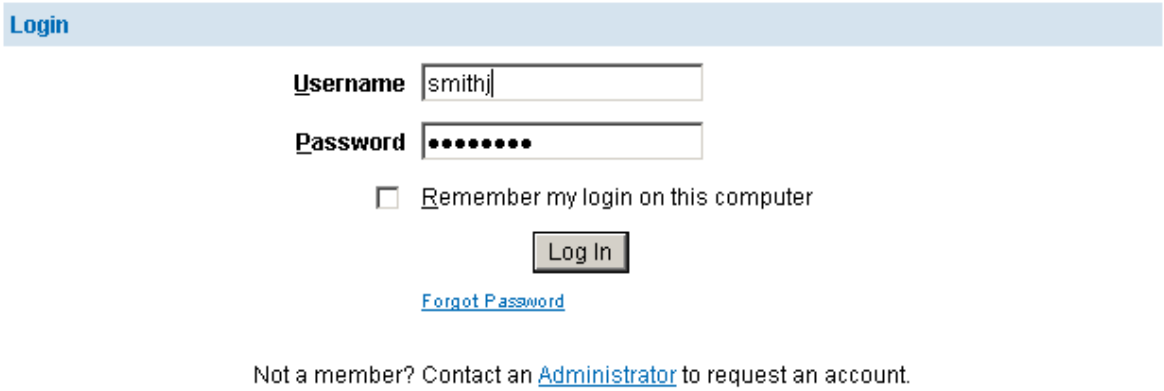
- Always use the navigation controls of the helpdesk instead of those supplied by the web browser like back, forward etc.
- You may exchange data with other programs by using the standard functionality of the windows clipboard.
- After entering information in a screen mask always press the appropriate button to save the information (e.g. the button Create while creating a new issue), before you switch to another screen mask.
- There is a timeout mechanism: if you don't use the helpdesk for more than approximately 20 minutes you will be logged off automatically and unsaved data will be lost.

3.2 The Log In

For entering the helpdesk use the web address **http://support.technidata.de/us.htm**


TechniData AG - Microsoft Internet Explorer bereitgestellt von TechniData Internet
http://support.technidata.de/us.htm
TechniData AG
TECHNIDATA
Hom
Log In
TechniData AG - Customer Helpdesk
DE :: EU :: US
Reliably functioning IT systems are crucial for trouble-free, efficient working. TechniData's customer helpdesk enables you now to profit from our employees' ample expertise gained over more than 20 years. Competent support in technical questions is given to you and your problems are processed in an efficient and controlled way always aiming at avoiding bottlenecks and downtimes.
Our helpdesk allows you to ask your questions and give in your problems all around the clock (7/24). Your inquiries are forwarded automatically to a competent employee. Automatic feedback e-mails inform you about the state of the process but you can also follow up the process in your own case list.
Log-in with your personal code. Go to Helpdesk
Local intranet
100%

To use the program you need to login first. Select ***Log In*** from the menu or use the link ***Go to Helpdesk*** to Log In.



Please enter your user name and password now and commit your entries with the OK Button. Please take care of the following log in rules:

- Username: the username usually consists of the last name and the first letter of the first name.

Example:
User ID: smithj

- The password is case sensitive.

3.3 Changing Personal Password

You can change your password for the helpdesk access via the web address **https://customer.technidata.de/changepassword**

To use the functionality you need to login first.

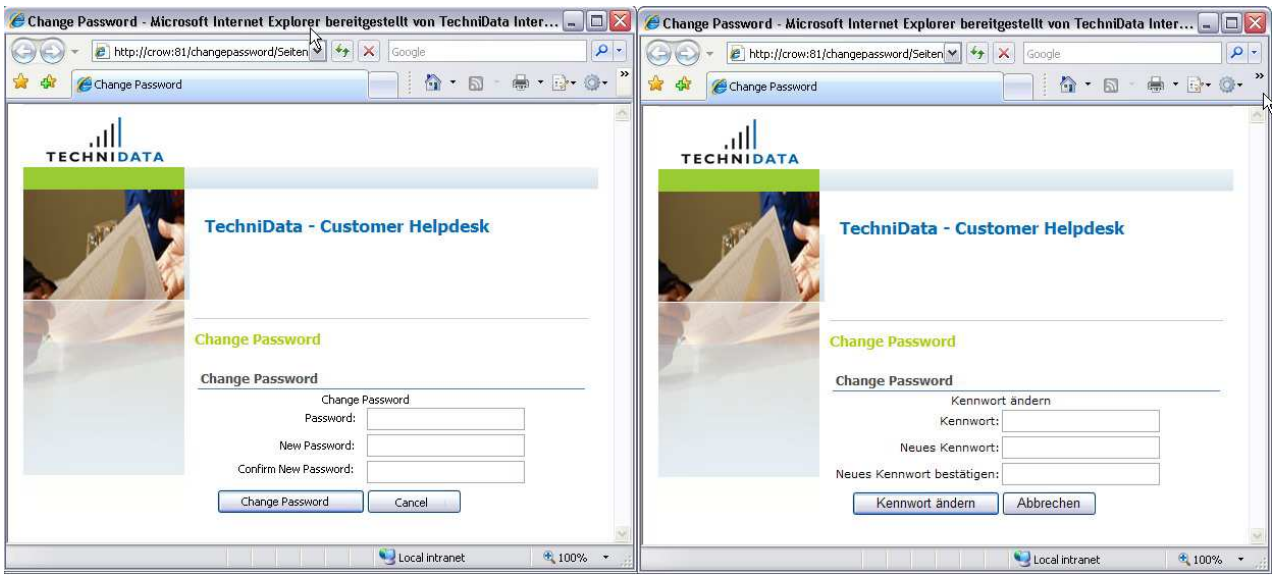
Please enter your user name and password now and commit your entries with the OK Button.

- Username: the username usually consists of the last name and the first letter of the first name.

  Example:

  User ID: smithj

- The password is case sensitive.


Change Password - Microsoft Internet Explorer bereitgestellt von TechniData Inter...
http://crow:81/changepassword/Seiten
Change Password
TECHNIDATA
TechniData - Customer Helpdesk
Change Password
Change Password
Change Password
Password:
New Password:
Confirm New Password:
Change Password
Cancel
Local intranet
100%
Change Password - Microsoft Internet Explorer bereitgestellt von TechniData Inter...
http://crow:81/changepassword/Seiten
Change Password
TECHNIDATA
TechniData - Customer Helpdesk
Change Password
Change Password
Kennwort ändern
Kennwort:
Neues Kennwort:
Neues Kennwort bestätigen:
Kennwort ändern
Abbrechen
Local intranet
100%

4 Program Functions

This chapter describes the application of the program.

4.1 Preface

This subchapter describes some basics, e.g. necessary items in conjunction with helpdesk and workflow.

4.1.1 Definitions

Issue Every contact via helpdesk with TechniData is an issue. There are several types of issues: Bug, Improvement, Enquiry, New Feature and Task

Priority When creating an issue you have to select a priority to indicate the importance.

Status Each issue has a status, which indicates where the issue currently is in its life-cycle ('workflow'). The available statuses are:

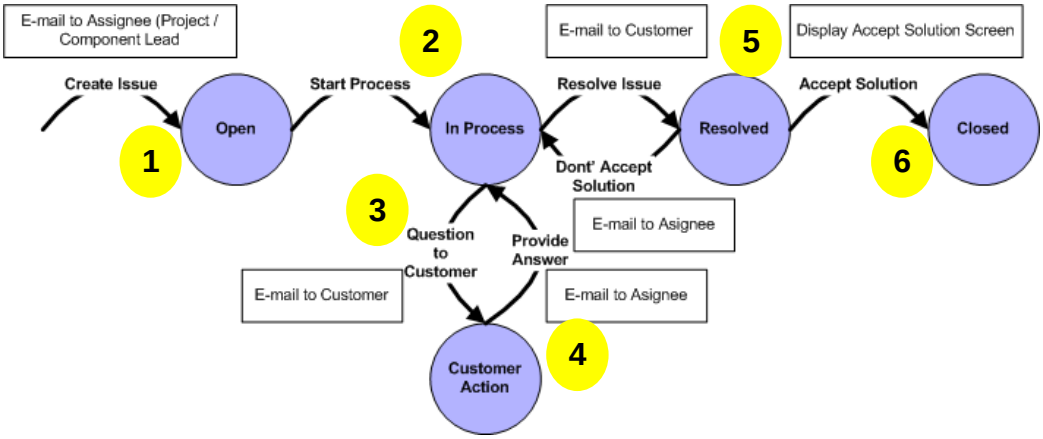
- **Open,** new issue, ready for the assignee to start work on it.
- **In Progress,** This issue is being actively worked on at the moment by the assignee
- **Question asked,** There is a question from TechniData because the Customer hasn't provided sufficient information to start working on the issue
- **Answer provided**, A question from TechniData was answered by the Customer
- **Resolved** A solution was provided by the helpdesk team
- **Closed** This issue has been completed

Project TechniData created projects for the different kinds of customer services. A project is a collection of issues which belong to a topic (i.e. CSM-CLEO Data, Rules and Services).

Component A component is a logical grouping of issues within a project and represents a sub topic.

4.1.2 Workflow

Workflow is the movement of an issue through various statuses during its lifecycle. The workflow starts with the creation of an issue and ends with the receipted solution provided by TechniData. In between the exchange of communication – e.g. questions and answers – proceeds via helpdesk. Every change of status will be announced by email.

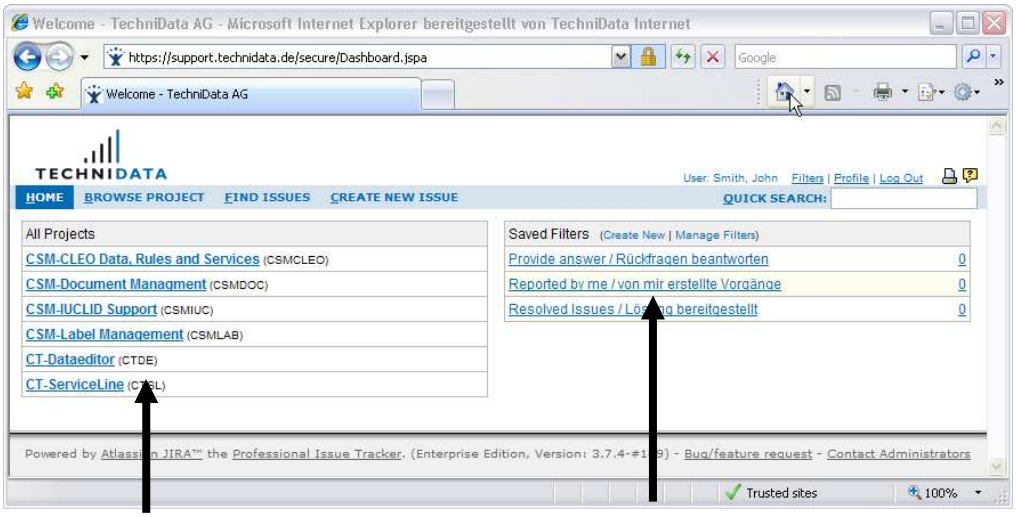


Workflow example:

1. You create a new issue. TechniData will be informed by email.
2. TechniData checks the issue. If all necessary information exist, TechniData starts working on the issue.
3. In the case your request is not clear or the information you provided is insufficient, you will get a query/question from TechniData. Additionally you will be informed about the query by email.
4. You answer the query.
5. TechniData provides a solution and you will get an e-mail that a solution is available.
6. You check the solution and if it is acceptable you can close the issue and the workflow ends.

4.2 The Dashboard of the Helpdesk

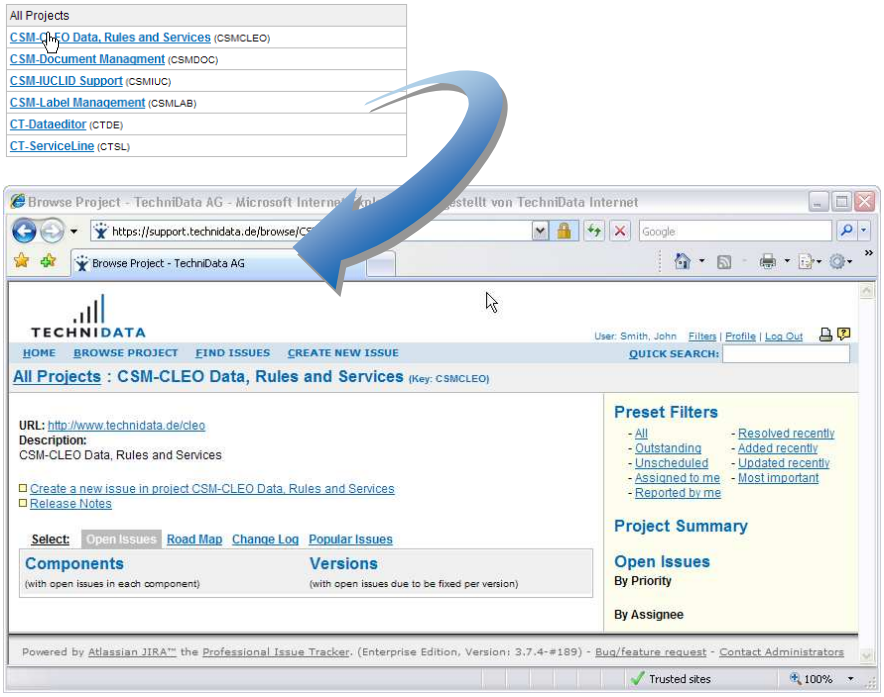
The dashboard provides an overview of your helpdesk. The left side shows the supported topics and services. The right side shows your individual filters. Filters are saved search activities.


Welcome - TechniData AG - Microsoft Internet Explorer bereitgestellt von TechniData Internet
https://support.technidata.de/secure/Dashboard.jspa
Welcome - TechniData AG
TECHNIDATA
User: Smith, John Filters | Profile | Log Out
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE
QUICK SEARCH:
All Projects
CSM-CLEO Data, Rules and Services (CSMCLEO)
CSM-Document Managment (CSMDOC)
CSM-IUCLID Support (CSMIUC)
CSM-Label Management (CSMLAB)
CT-Dataeditor (CTDE)
CT-ServiceLine (CTSL)
Saved Filters (Create New | Manage Filters)
Provide answer / Rückfragen beantworten 0
Reported by me / von mir erstellte Vorgänge 0
Resolved Issues / Lösung bereitgestellt 0
Powered by Atlassian JIRA™ the Professional Issue Tracker. (Enterprise Edition, Version: 3.7.4-#1
Bug/feature request - Contact Administrators
Trusted sites
100%

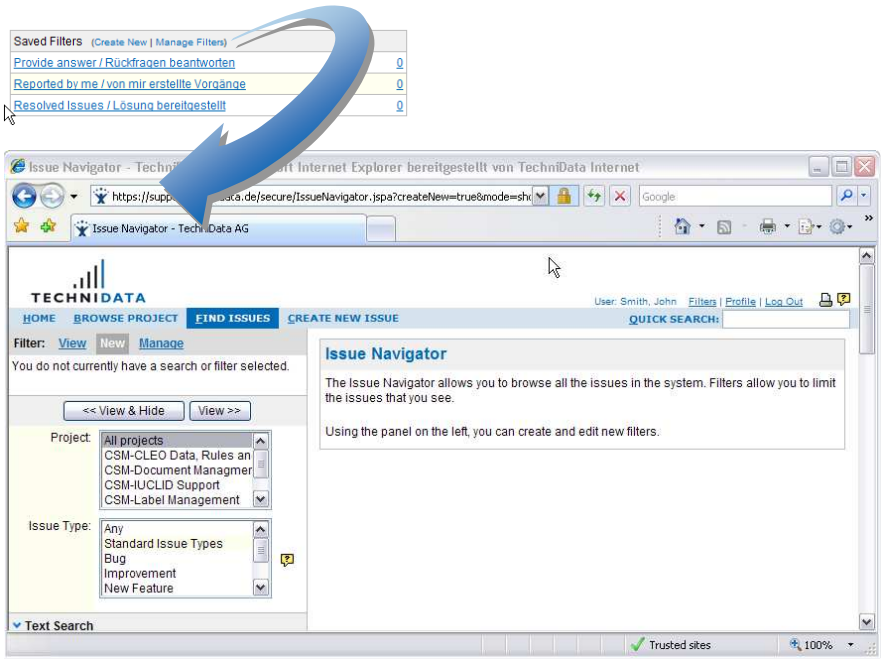
Topics and services (Projects) Search filters

By using the links or the menu you can create a new issue or access existing issues.

By selecting a topic or service (project) you will get detailed information about it.



By selecting “Create New/Manage Filter” you may create your own filters when necessary.


Saved Filters (Create New | Manage Filters)
Provide answer / Rückfragen beantworten 0
Reported by me / von mir erstellte Vorgänge 0
Resolved Issues / Lösung bereitgestellt 0
Issue Navigator - TechniData AG
TECHNIDATA
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE
QUICK SEARCH:
Filter: View New Manage
You do not currently have a search or filter selected.
<< View & Hide View >>
Project: All projects
CSM-CLEO Data, Rules an
CSM-Document Managmer
CSM-IUCLID Support
CSM-Label Management
Issue Type: Any
Standard Issue Types
Bug
Improvement
New Feature
Text Search
Issue Navigator
The Issue Navigator allows you to browse all the issues in the system. Filters allow you to limit the issues that you see.
Using the panel on the left, you can create and edit new filters.

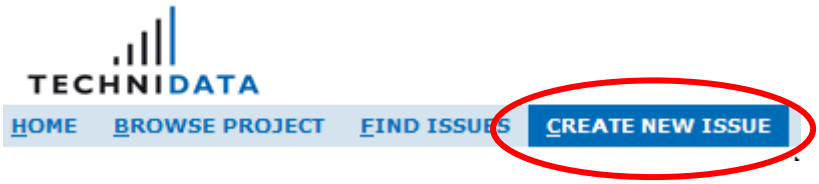
4.3 Work with Issues

4.3.1 General Information about Issues

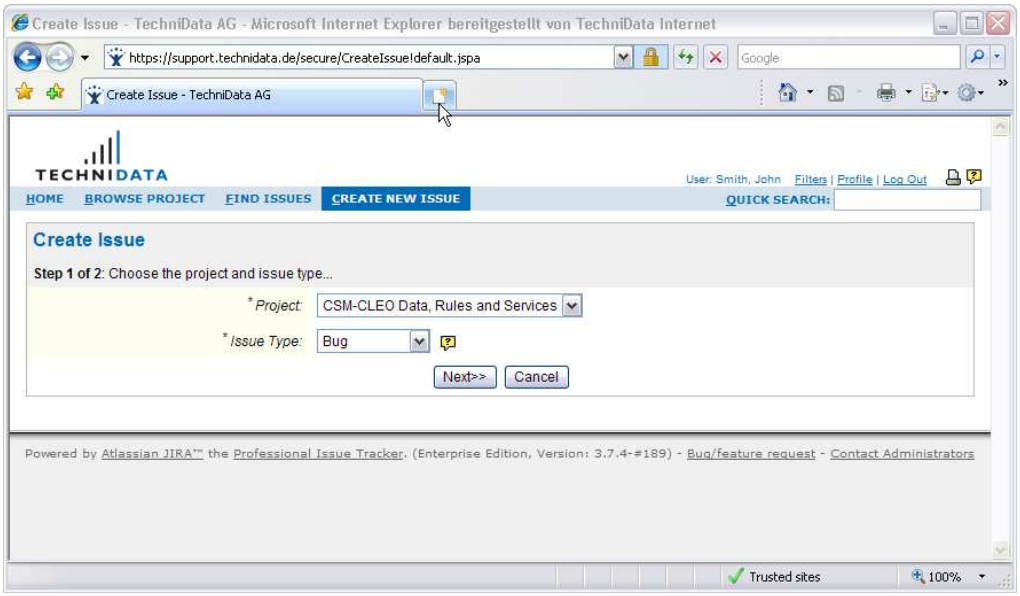
An issue has multiple attributes like key, type, status, priority, assignee and reporter. To change data of an issue several operations can be performed like attach file or screenshot. To change the status of an issue several workflow operations can be performed i.e. like close.

4.3.2 Creating Issues

This subchapter describes how to create and follow up an issue. To create a new issue, select **CREATE NEW ISSUE** in the primary menu of the homepage



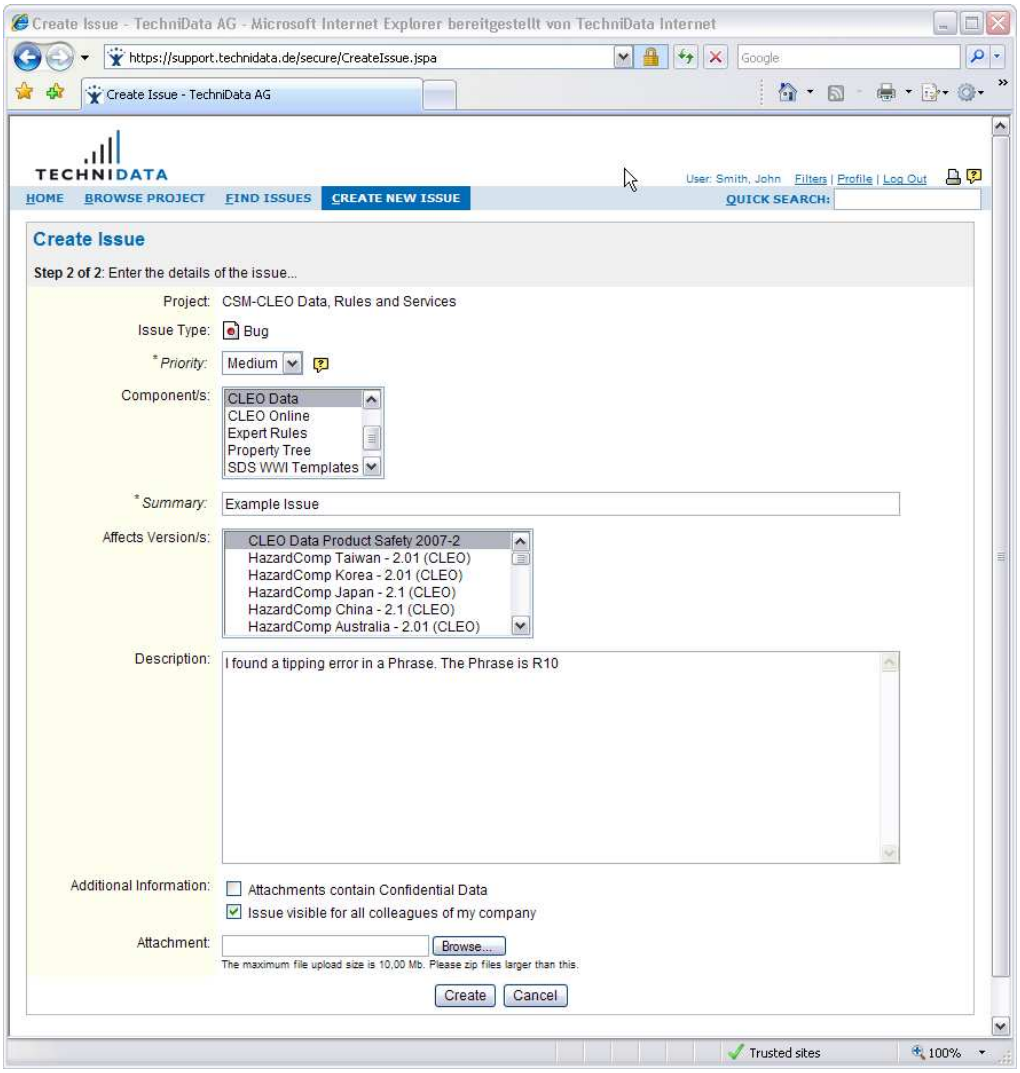
In the windows Create Issue – Step 1 choose the topic or service (project) and the type of issue.


Create Issue - TechniData AG - Microsoft Internet Explorer bereitgestellt von TechniData Internet
https://support.technidata.de/secure/CreateIssue!default.jspa
Create Issue - TechniData AG
TECHNIDATA
User: Smith, John Filters | Profile | Log Out
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE QUICK SEARCH:
Create Issue
Step 1 of 2: Choose the project and issue type...
*Project: CSM-CLEO Data, Rules and Services
*Issue Type: Bug
Next>> Cancel
Powered by Atlassian JIRA™ the Professional Issue Tracker. (Enterprise Edition, Version: 3.7.4-#189) - Bug/feature request - Contact Administrators
Trusted sites
100%

Choose the best fitting type of issue:

Bug	A problem which impairs or prevents the functions of the product
Improvement	An improvement or enhancement to an existing feature or task
Enquiry	Requirements of special information
New Feature	A new feature of the product which has yet to be developed
Task	A task that needs to be done

Click Next and enter detailed information about your problem in the windows Create Issue – Step 2. Note: fields marked with an asterisk (*) are mandatory.


Create Issue - TechniData AG - Microsoft Internet Explorer bereitgestellt von TechniData Internet
https://support.technidata.de/secure/CreateIssue.jspa
Create Issue - TechniData AG
TECHNIDATA
User: Smith, John Filters | Profile | Log Out
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE QUICK SEARCH:
Create Issue
Step 2 of 2: Enter the details of the issue...
Project: CSM-CLEO Data, Rules and Services
Issue Type: Bug
*Priority: Medium
Component/s: CLEO Data, CLEO Online, Expert Rules, Property Tree, SDS WWI Templates
*Summary: Example Issue
Affects Version/s: CLEO Data Product Safety 2007-2, HazardComp Taiwan - 2.01 (CLEO), HazardComp Korea - 2.01 (CLEO), HazardComp Japan - 2.1 (CLEO), HazardComp China - 2.1 (CLEO), HazardComp Australia - 2.01 (CLEO)
Description: I found a tipping error in a Phrase. The Phrase is R10
Additional Information: Attachments contain Confidential Data
Issue visible for all colleagues of my company
Attachment: Browse...
The maximum file upload size is 10,00 Mb. Please zip files larger than this.
Create Cancel
Trusted sites
100%

1. Choose the priority of your issue.

Blocker	Blocks development and/or testing work, production could not run
High	Serious faults or very urgent inquiries
Medium	Default Priority
Low	Cosmetic changes, non-committal suggestions etc.

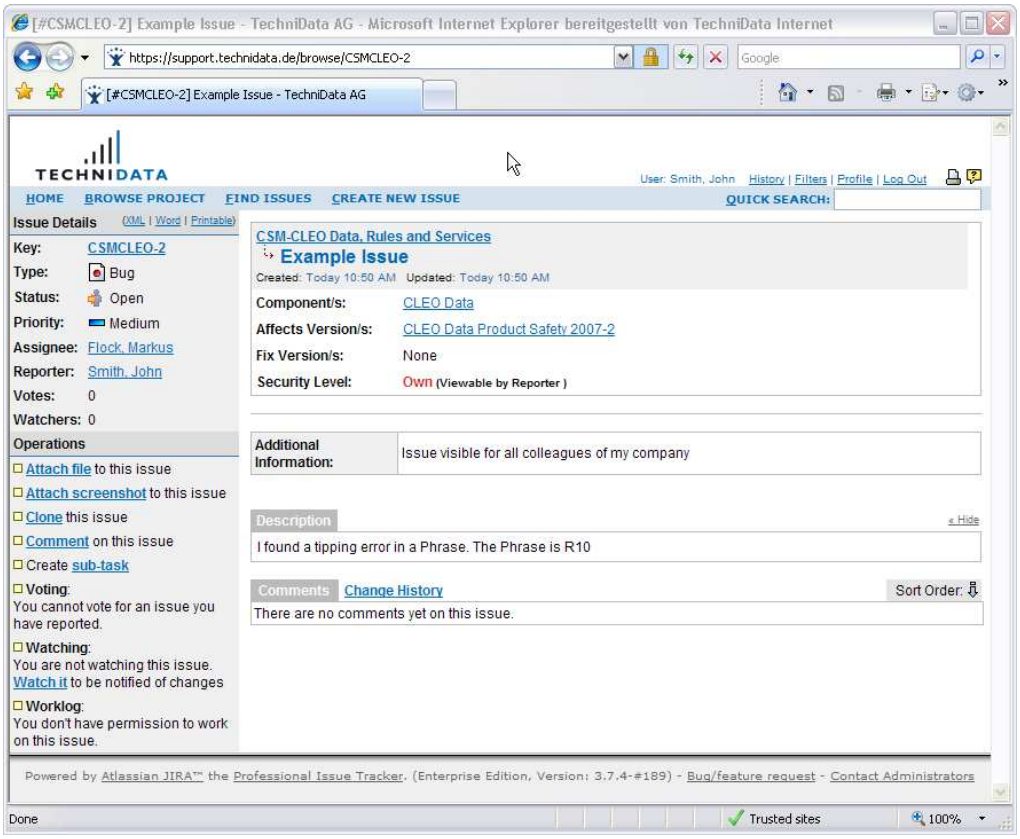
2. Then choose a component regarding your enquiry. If you're not sure what to select choose UNKNOWN.
3. Enter a short summary about your issue in German or English.
4. If possible select an affected product version. If you're not sure what to select choose UNKNOWN
5. Please, provide then detailed information about your issue in German or English.

6. Under additional information you can
   - mark the content of your issue as confidential
   - make the issue visible to other colleagues of your company
   - add attachments which help to understand your issue

Please provide as much information as you can about the topic: a detailed description, related substance names and numbers, vendor name, the kind of software you use, screen-shots, and additional files with more information. This will speed up the processing time of your issue enormous.

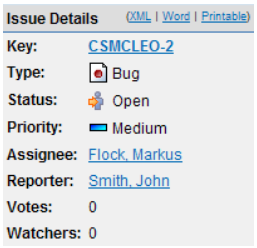
After completing all mandatory fields, send your issue to TechniData by using the button **"Create"**. The person in charge at TechniData will be informed by email.

The helpdesk switches to the window issue details view. You can access this window at any time if you want to inform yourself about the status of your issue.

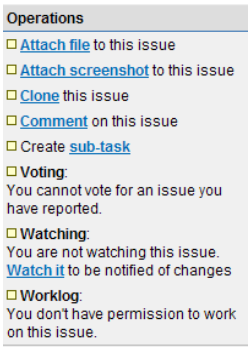

[#CSMCLEO-2] Example Issue - TechniData AG - Microsoft Internet Explorer bereitgestellt von TechniData Internet
https://support.technidata.de/browse/CSMCLEO-2
[#CSMCLEO-2] Example Issue - TechniData AG
TECHNIDATA
User: Smith, John History | Filters | Profile | Log Out
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE
QUICK SEARCH:
Issue Details (XML | Word | Printable)
Key: CSMCLEO-2
Type: Bug
Status: Open
Priority: Medium
Assignee: Flock, Markus
Reporter: Smith, John
Votes: 0
Watchers: 0
Operations
Attach file to this issue
Attach screenshot to this issue
Clone this issue
Comment on this issue
Create sub-task
Voting:
You cannot vote for an issue you have reported.
Watching:
You are not watching this issue.
Watch it to be notified of changes
Worklog:
You don't have permission to work on this issue.
CSM-CLEO Data, Rules and Services
Example Issue
Created: Today 10:50 AM Updated: Today 10:50 AM
Component/s: CLEO Data
Affects Version/s: CLEO Data Product Safety 2007-2
Fix Version/s: None
Security Level: Own (Viewable by Reporter)
Additional Information: Issue visible for all colleagues of my company
Description
« Hide
I found a tipping error in a Phrase. The Phrase is R10
Comments Change History
Sort Order:
There are no comments yet on this issue.
Powered by Atlassian JIRA™ the Professional Issue Tracker. (Enterprise Edition, Version: 3.7.4-#189) - Bug/feature request - Contact Administrators
Done
Trusted sites
100%

4.3.3 The Issue Details View

The section ***Issue Details*** provides primary information about an issue and the actual status.



The section ***Operations*** provides actions which can be executed on your issue. The action list will change in conjunction with the issue status.


Operations
Attach file to this issue
Attach screenshot to this issue
Clone this issue
Comment on this issue
Create sub-task
Voting:
You cannot vote for an issue you have reported.
Watching:
You are not watching this issue.
Watch it to be notified of changes
Worklog:
You don't have permission to work on this issue.

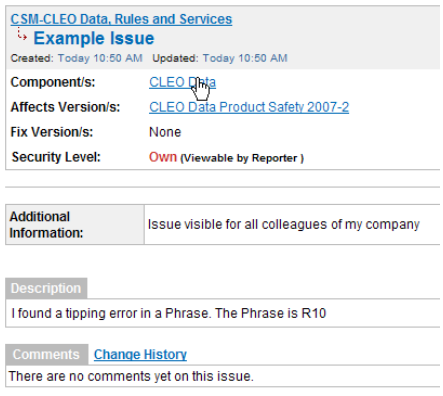
Provide additional information for your issue at any time via.

- **Attach file**
- **Attach screenshot**
- **Comments**

Create optionally new tasks via.

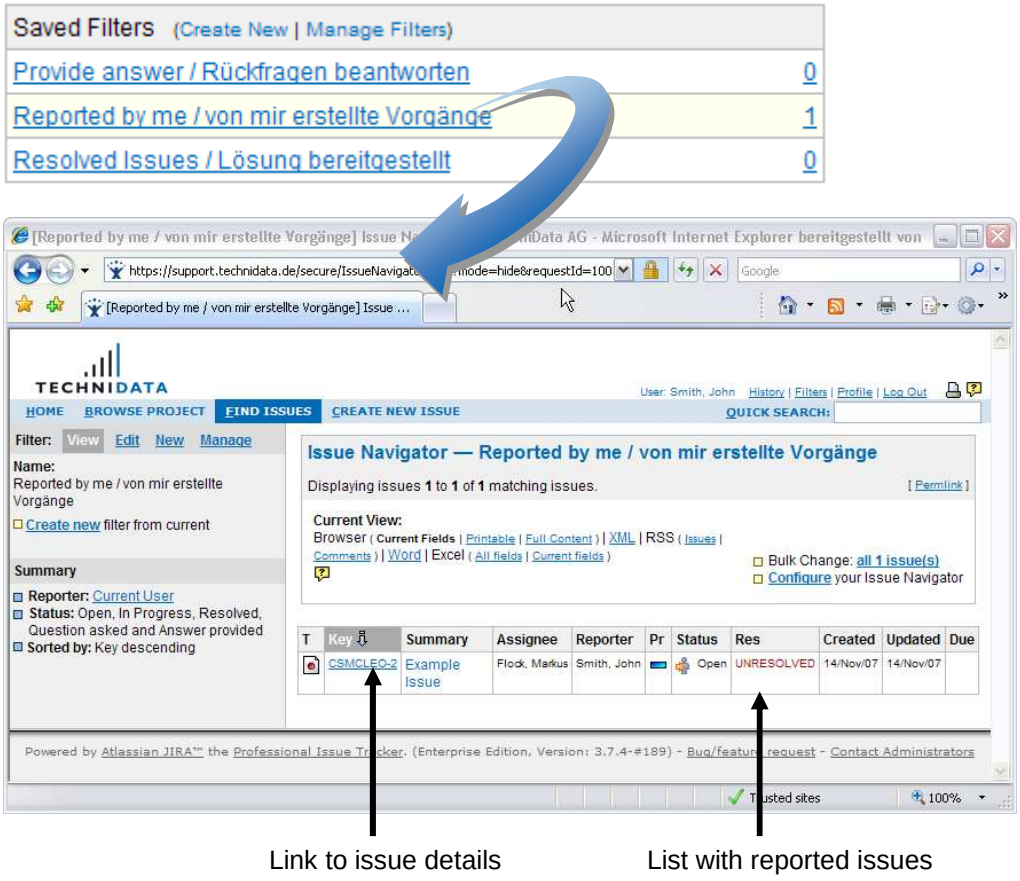
- **Clone**, shall be used to re-open an Issue when it was closed or a similar issue must be created by you.
- **Subtasks**, split your issue into sub tasks for the helpdesk. We recommend creating separate issues only because it is better to trace.

The section ***on the left side*** provides detailed information on the issue, status and history.


CSM-CLEO Data, Rules and Services
Example Issue
Created: Today 10:50 AM Updated: Today 10:50 AM
Component/s: CLEO Data
Affects Version/s: CLEO Data Product Safety 2007-2
Fix Version/s: None
Security Level: Own (Viewable by Reporter)
Additional Information: Issue visible for all colleagues of my company
Description
I found a tipping error in a Phrase. The Phrase is R10
Comments Change History
There are no comments yet on this issue.

4.3.4 Checking Inter Active the Status of an Issue

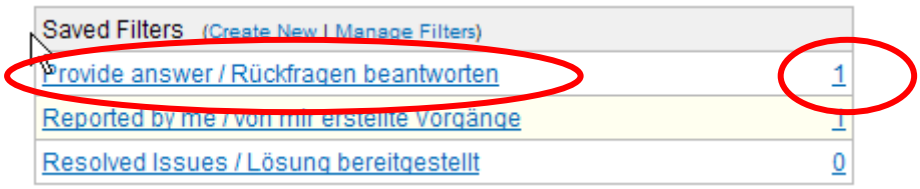
Start at the helpdesk dashboard and choose the filter ***Reported by me***

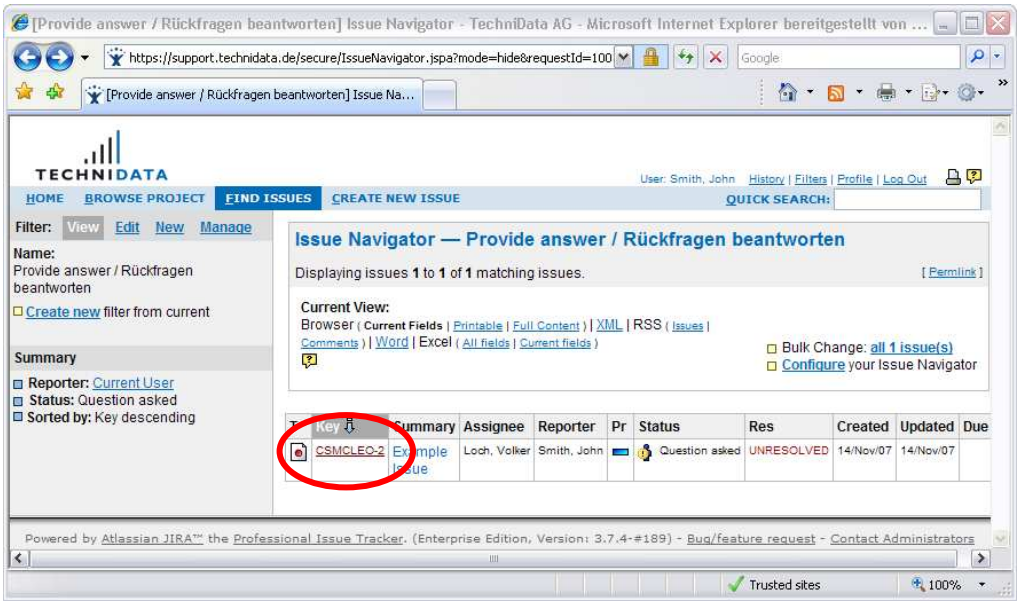

Saved Filters (Create New | Manage Filters)
Provide answer / Rückfragen beantworten 0
Reported by me / von mir erstellte Vorgänge 1
Resolved Issues / Lösung bereitgestellt 0
TECHNIDATA
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE QUICK SEARCH:
Issue Navigator — Reported by me / von mir erstellte Vorgänge
Displaying issues 1 to 1 of 1 matching issues.
Link to issue details
List with reported issues

4.3.5 Helpdesk has a Question about an Issue

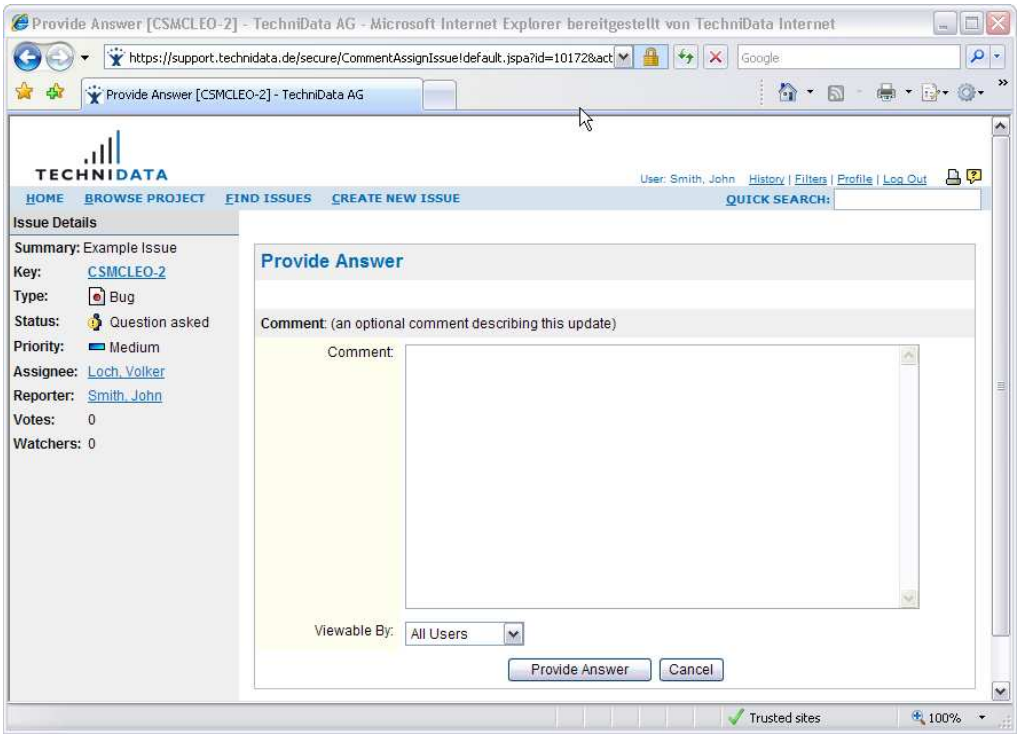
If TechniData needs more information about an issue or if there are questions about it, you will get an email. Via the link in the headline of the mail you will reach the helpdesk log in, where you can answer the query.

Optionally you can provide an answer manually. The filter “Provide answer” available on the dashboard indicates that a question was sent from the helpdesk. Click on the filter to see the issue list where answers have to be provided by you. Open then the issue by selecting the issue key.


Saved Filters (Create New | Manage Filters)
Provide answer / Rückfragen beantworten 1
Reported by me / von mir erstellte Vorgänge 1
Resolved Issues / Lösung bereitgestellt 0


[Provide answer / Rückfragen beantworten] Issue Navigator - TechniData AG - Microsoft Internet Explorer bereitgestellt von ...
https://support.technidata.de/secure/IssueNavigator.jspa?mode=hide&requestId=100
TECHNIDATA
User: Smith, John History | Filters | Profile | Log Out
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE QUICK SEARCH:
Filter: View Edit New Manage
Name:
Provide answer / Rückfragen beantworten
Create new filter from current
Summary
Reporter: Current User
Status: Question asked
Sorted by: Key descending
Issue Navigator — Provide answer / Rückfragen beantworten
Displaying issues 1 to 1 of 1 matching issues.
[Permlink]
Current View:
Browser (Current Fields | Printable | Full Content) | XML | RSS (Issues | Comments) | Word | Excel (All fields | Current fields)
Bulk Change: all 1 issue(s)
Configure your Issue Navigator
Key Summary Assignee Reporter Pr Status Res Created Updated Due
CSMCLEO-2 Example Issue Loch, Volker Smith, John Question asked UNRESOLVED 14/Nov/07 14/Nov/07
Powered by Atlassian JIRA™ the Professional Issue Tracker. (Enterprise Edition, Version: 3.7.4-#189) - Bug/feature request - Contact Administrators
Trusted sites
100%

Select the Workflow activity ***Provide Answer***. A new screen appears where you have to enter the answer in the description field in German or English. Finally you must press the button ***Provide Answer***. The person in charge at TechniData will be informed by email.



4.3.6 Helpdesk Provides a Solution

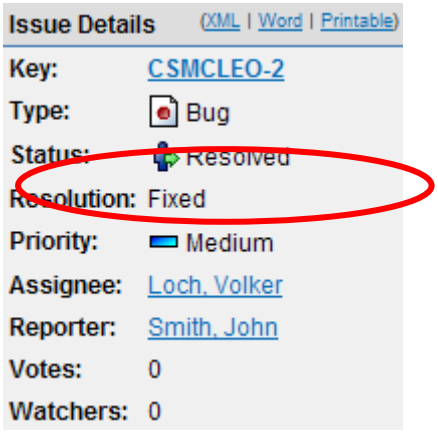
You will get an email as soon as a resolution is provided. There are different kinds of resolutions as shown below:

Fixed	A fix for this issue has been implemented
Won't Fix	This issue will not be fixed, e.g. it may no longer be relevant.
Duplicate	The problem is a duplicate of an existing issue.
Incomplete	There is not enough information to work on this issue or it is only possible to provide a resolution for a part of the problem
Cannot Reproduce	This issue could not be reproduced at this time, or not enough information was available to reproduce the issue. If more information becomes available, please reopen the issue.

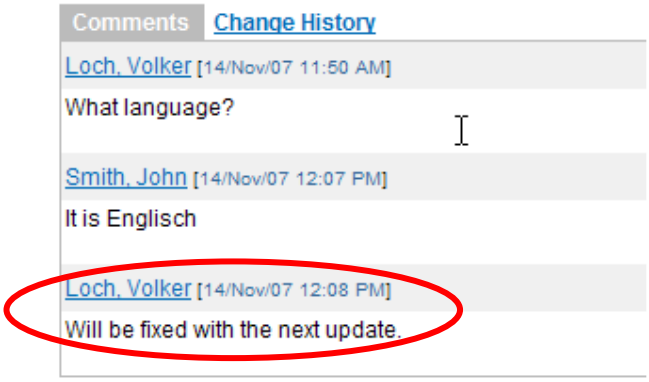
Saved Filters (Create New | Manage Filters)
Provide answer / Rückfragen beantworten 0
Reported by me / von mir erstellte Vorgänge 1
Resolved Issues / Lösung bereitgestellt 1

Optionally you can check the provided solution manually. The filter “Resolved Issues” available on the dashboard indicates that a solution was sent from the helpdesk. Click on the filter to see the issue list where a solution was provided to you. Open then the issue by selecting the issue key to check the provided solution.

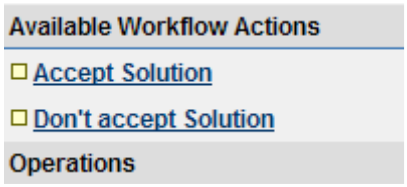
Issue status



The provided solution can be found under Comments



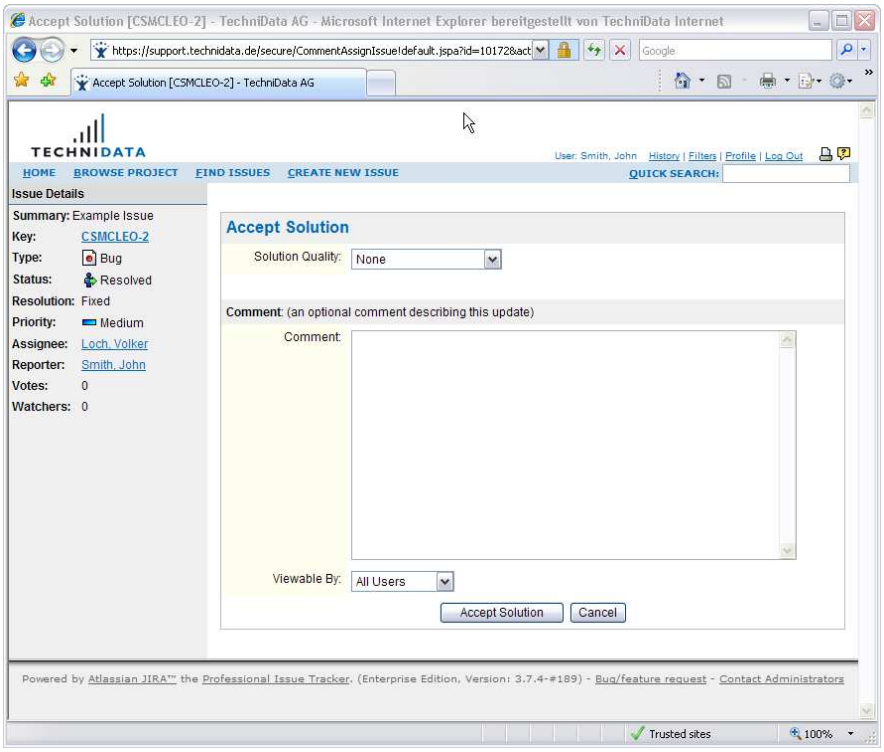
Finally, you must accept or deny the provided solution by selecting the corresponding workflow action.



- **Don't Accept Solution**
  If you don't accept the solution the issues will be set into the status processing again and the person in charge at TechniData will be informed by email.

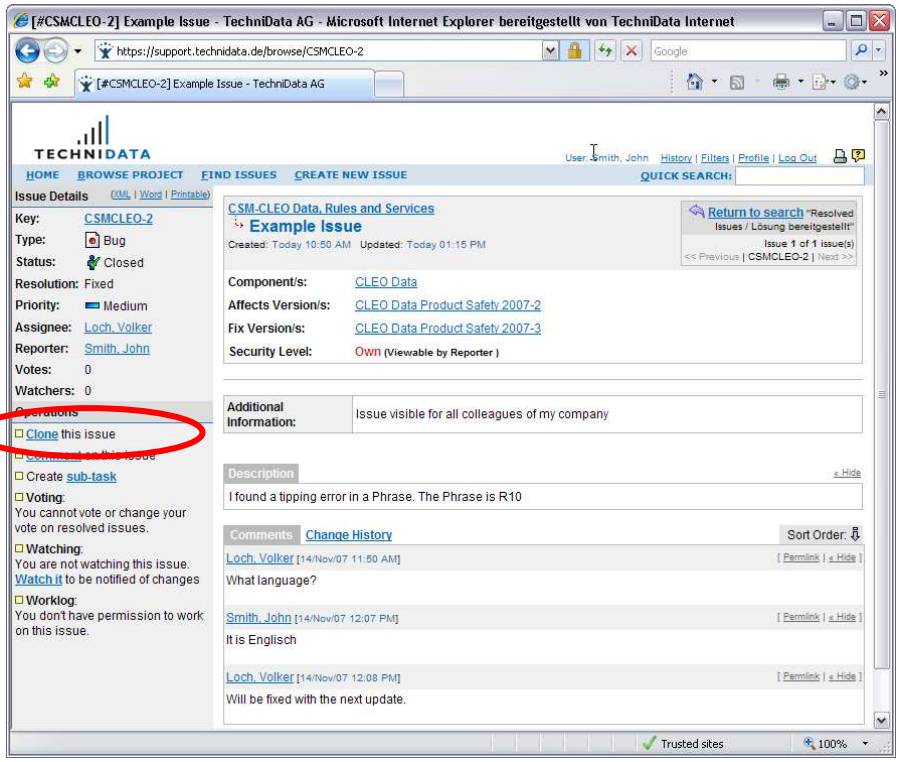
  Please add always an additional comment explaining why you don't accept the solution!

- **Accept Solution**
  The lifecycle of an issue normally ends with that answer. When you accept the solution you have the possibility to give us a short feedback about the quality of the helpdesk service or provided solution.



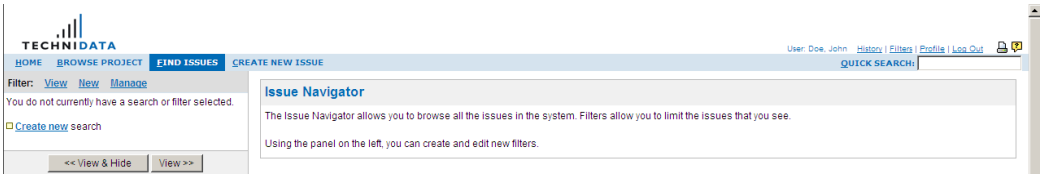
4.3.7 Reopen an Issue

A closed issue can be reopened via the clone action at any time.

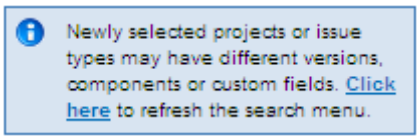

[#CSMCLEO-2] Example Issue - TechniData AG - Microsoft Internet Explorer bereitgestellt von TechniData Internet
https://support.technidata.de/browse/CSMCLEO-2
[#CSMCLEO-2] Example Issue - TechniData AG
TECHNIDATA
User: Smith, John History | Filters | Profile | Log Out
HOME BROWSE PROJECT FIND ISSUES CREATE NEW ISSUE
QUICK SEARCH:
Issue Details (XML | Word | Printable)
Key: CSMCLEO-2
Type: Bug
Status: Closed
Resolution: Fixed
Priority: Medium
Assignee: Loch, Volker
Reporter: Smith, John
Votes: 0
Watchers: 0
Clone this issue
Create sub-task
Voting:
You cannot vote or change your vote on resolved issues.
Watching:
You are not watching this issue.
Watch it to be notified of changes
Worklog:
You don't have permission to work on this issue.
CSM-CLEO Data, Rules and Services
Example Issue
Created: Today 10:50 AM Updated: Today 01:15 PM
Return to search "Resolved Issues / Lösung bereitgestellt"
Issue 1 of 1 issue(s)
<< Previous | CSMCLEO-2 | Next >>
Component/s: CLEO Data
Affects Version/s: CLEO Data Product Safety 2007-2
Fix Version/s: CLEO Data Product Safety 2007-3
Security Level: Own (Viewable by Reporter)
Additional Information: Issue visible for all colleagues of my company
Description
« Hide
I found a tipping error in a Phrase. The Phrase is R10
Comments Change History
Sort Order:
Loch, Volker [14/Nov/07 11:50 AM]
[Permlink | « Hide]
What language?
Smith, John [14/Nov/07 12:07 PM]
[Permlink | « Hide]
It is Englisch
Loch, Volker [14/Nov/07 12:08 PM]
[Permlink | « Hide]
Will be fixed with the next update.
Trusted sites
100%

4.3.8 Find Issues

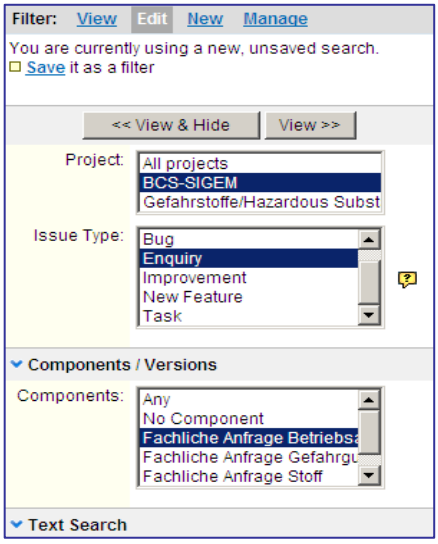
By using the menu item ***FIND ISSUES*** you can search issues on the basis of several criteria.


TECHNIDATA
HOME
BROWSE PROJECT
FIND ISSUES
CREATE NEW ISSUE
QUICK SEARCH:
Filter: View New Manage
You do not currently have a search or filter selected.
Create new search
<< View & Hide
View >>
Issue Navigator
The Issue Navigator allows you to browse all the issues in the system. Filters allow you to limit the issues that you see.
Using the panel on the left, you can create and edit new filters.

For a new search click on Create new search.
Choose the best fitting criteria for your search.
The criteria depend on the project. The following flash asks you to update the list of criteria.


Newly selected projects or issue types may have different versions, components or custom fields. Click here to refresh the search menu.

Update the list by using the link *Click here.*
Afterwards click on the button View >>.
You will get a hit list with all issues regarding the chosen criteria.
You can save the search criteria as a filter. All filters will be shown on your homepage for quick access.



4.4 General Functions

Maybe you want to customize the helpdesk system regarding the interface language or your profile. If you want to stop working with the helpdesk you need to log out. These functions are described below.

- **Change Locale:** Click on the link Profile in the upper right corner near your user name. Then click on the action Edit preferences.
- **Edit Profile:** Click on the link Profile in the upper right corner near your user name. Then click on the action Edit profile. You may change your long name and your email address. Please don't delete the company name within the long name.
- **Log out:** Click on the link Log out in the upper right corner near your user name

4.5 Complete Documentation of the Jira Program

The complete documentation with much more details on the Jira program can be opened via the help link, available on each screen